

Request for Proposals (RFP)
Regional Economic Development Organization (REDO) Grant Program

RFP Release Date: September 16, 2016

RFP Deadline: October 7, 2016 by 4:00PM
Late or incomplete applications will not be accepted.

Send RFP to: REDOApplications@state.ma.us
Cc: Applicable MOBD Regional Director.

Address: Massachusetts Office of Business Development
10 Park Plaza, Suite 3730
Boston, MA 02116

Contact Person: Devon Goodall Email: Devon.L.Goodall@state.ma.us Phone: 617-973-8541

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Announcement and Purpose of Grant

The Executive Office of Housing and Economic Development (EOHED) through the Massachusetts Office of Business Development (MOBD) is now accepting proposals for the Regional Economic Development Organization (REDO) Grant Program for FY2017.

Selected organizations must support regionally based efforts to stimulate, encourage, facilitate and nurture economic growth and prosperity in the Commonwealth including, but not limited to, the identification of regional competitive strengths, challenges and opportunities, regional cluster development strategies, the development of long-range regional workforce skills pipelines in collaboration with workforce and education partners, transportation and land use planning, and other systems-based activities related to the growth and retention of existing businesses and the attraction of new businesses into the Commonwealth.

REDOs shall work with MOBD in establishing and carrying out the regional initiatives and the scope of work with the given key components. The collaboration between MOBD and REDOs should provide efficient and consistent responses to businesses seeking assistance from the Commonwealth.

Eligibility

- Be exempt from federal taxation under 501(c) of the Internal Revenue Code.
- Demonstrate a primary focus on regional economic development (such as creating, retaining, and attracting businesses across all industry sectors).
- Perform the services required by MGL Chapter 23A Section 3J and 3K, as amended by sections 8 and 9 of Chapter 219 of the Acts of 2016 – see *Governance* on p.7
- Operate regionally and service 10 or more contiguous cities/towns with interrelated economic assets.
- Develop programs to encourage participation in economic development activities from businesses, public and quasi-public agencies, and municipalities.
- Have received or have commitments to receive substantial financial and in-kind support from private resources or member municipalities.
- Be capable of and agree to provide services to the entire region identified in the proposal.

Ineligible Organizations

- Organizations that do not operate regionally and/or do not service 10 or more contiguous cities or towns.
- Governmental regional entities, which serve as regional or district planning commissions under M.G.L. Chapter 40B.
- Regional employment boards.
- Tourism councils under M.G.L. Chapter 23A § 14.

- Entities that are a political subdivision of a municipality or wholly owned by a municipality.

Use of Funds

Limitation on Non-REDO Associated Overhead Costs

- No more than 10% of the REDO grant can be used for the grantee's overhead costs (see Governance attachment for specific activities)

Total Budgetary Limitations

- This REDO grant may only supplement budgets; therefore, **the requested amount should not exceed 50% of the organization's actual prior year operating budget** (assuming the organization's current operating budget has not increased by more than 15% over the prior year).
- This grant is intended to increase organizational capacity and improve service delivery for the benefit of the Massachusetts business climate.
- Grant funds from the REDO Grant Program **cannot** be used to subsidize operating costs for the grantee's other (non-REDO) functions.
- Organizations shall leverage at least \$.50 in matching funds for every \$1 granted pursuant to this program, and shall file interim and annual reports as detailed in Grant Program Reporting section below.

Other Public or Quasi-Public Funding Sources

- Organizations are required to list other funding sources on the application. Please disclose:
 1. The origin and amount of the funding;
 2. Detailed budgets and accounting documents for REDO grant funds in order to differentiate spending from each source of funding; and
 3. If applicable, describe any initiatives that are planned to be jointly funded through the REDO Grant and another public funding source.

Key Components	Grant Conditions	Deliverables in FY2017
	Represents the baseline expectation for the FY2017 REDO Grantees.	<u>Minimum Deliverable</u> required in FY2017. In the Proposal Narrative and Performance Measures Attachment, the applicant is encouraged to define other deliverables/actions in the key component areas.
Regional Initiatives & Strategic Partners	<p>Assessing regional competitive strengths, weaknesses and opportunities;</p> <p>Representing the regional business community in collaborative, long-range workforce skills, transportation and land use planning;</p> <p>Promoting connections across sectors of the regional economy.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Identify the strengths, weaknesses, and opportunities in the region and elaborate details and the plans in the <u>attachment 3 narrative</u>. <input type="checkbox"/> List key strategic partnerships the organization has formed across sectors to enhance economic development in the region. <input type="checkbox"/> List current resource offerings and capabilities related to regional expertise. Explain further how the organization will develop regional partnerships and expertise resources.
Retain, Expand, and Attract Businesses	<p>Promoting regionally significant industry clusters;</p> <p>Maintaining an inventory of key development parcels;</p> <p>Furnishing advice and assistance to businesses and industrial prospects which may locate in the region; measuring and tracking results in job growth, retention or technical assistance.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Maintain and provide a copy of priority development sites. <input type="checkbox"/> Host or participate in an event to promote regional clusters, such as Manufacturing Day. <input type="checkbox"/> Invite MOBD to at least 10 company meetings over the grant period. <input type="checkbox"/> Provide the number of jobs created and retained, and the total private business investment if available, and the number and names of small businesses that are being supported by the REDO. <input type="checkbox"/> Establish performance measures and track market activity for business development efforts and share as requested through REDO Grant Program reporting.
Education and Workforce Development	<p>Representing the regional business community in long-range workforce skills pipeline planning efforts to ensure robust skills and talent pipelines that meet regional needs.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Consistent with the goals of the Governor's Workforce Skills Cabinet, ensure that initiatives and collaboration efforts are aligned with regional economic development, workforce development, and higher education strategic planning priorities. Work in partnership with universities, community colleges, regional Workforce Development Boards, and vocational-technical schools to build pathways for available jobs in high-growth industries. In partnership with education and workforce partners, host at least 1 job fair or similar event to promote regional workforce development.
Regional Collaboration	<p>Working with MOBD, Regional Directors, and partners to establish a series of regionally-based economic development forums focused on economic development strategies, best practices, regional challenges and other regional topics.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> In partnership with the MOBD Regional Director, host at least 1 forum with regional economic development partners to discuss regional strategies, best practices, on-going challenges and issues, etc.
Communication, Highlights, Issues & Reports	<p>Marketing the region in coordination with the Massachusetts marketing partnership established under section 13A; maintaining a calendar of regional events, major forums and groundbreakings;</p> <p>Assisting the MOBD Regional Director with content for MOBD newsletter</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Meet with MOBD Regional Director at least once per month to update on the program. Communicate timely on major events and issues in the region. <input type="checkbox"/> Regularly update website with regional events, major events and groundbreakings. <input type="checkbox"/> Submit at least one newsletter story of best practices or region highlight to MOBD per month.

Selection process and criteria

MOBD, in consultation with EOHED, will review and score the grant proposals and at its sole discretion contract with individual organizations and/or regional partnerships that demonstrate an ability to utilize grant funds to improve upon the region's economic competitiveness. Successful proposals will meet the minimum eligibility requirements, and:

- Detail a compelling vision for the use of public funds, in accordance with the contractual priorities outlined above, and in alignment with the Commonwealth's comprehensive economic development plan, *Opportunities for All*;
- Demonstrate the value added by the organization to the region, and present a thoughtful, organized, well-written and complete grant proposal;
- If applicable, demonstrate the successful implementation of services outlined in the organization's most recent REDO Grant Program contract with MOBD;
- Demonstrate a data-driven understanding of regional competitive strengths, challenges, and opportunities, and regionally significant industry clusters;
- Include regional collaboration. Partnerships are encouraged among similar organizations, including workforce and education partners, in the same region;
- The Massachusetts Office of Business Development reserves the right to require, as a condition of a grant of funds, that two or more organizations with significant overlap in service areas or initiatives create a regional partnership to ensure regional coverage.

Contract and Payment

If the proposal is accepted for funding, disbursement of grant funds is subject to the execution of a contract with the grantee. The application and grant proposal narrative shall become the basis for MOBD's contract negotiations with the applicant to determine the precise scope of work, budget and use of funds. All documents deemed necessary by MOBD will be revised from the grant proposal and incorporated into the contract as attachments, including a scope of work submitted by the Grantee and approved by MOBD. References to all attachments will be written into the standard contract form prior to execution by the Grantee.

Grant Program Reporting

- Executive summaries (quarterly and annually) should include regional highlights, issues, events, updates on programs and initiatives, and other high level information that is deemed necessary.
- For partnerships, the lead organization should provide an evaluation of the collaboration in addition to the summary. Partnerships are expected to collaborate on executive summaries and submit one summary per partnership.
- It is expected that important regional highlights will be communicated in real-time to the MOBD Main Office or Regional Offices
- Tracking outreach templates (in excel) should be submitted quarterly and can be done jointly or separately

Application Checklist

- ☐ Application
- ☐ Attachment 1: List of board of directors, if available
- ☐ Attachment 2: Minimum 10 letters of support from municipalities
- ☐ Attachment 3: Narrative proposal on the initiatives proposed
- ☐ Attachment 4: Proposed performance measures for initiatives, programs, and market activity
- ☐ Attachment 5: Most recent audited or reviewed financial statements
- ☐ Attachment 6: Line item budget for proposed use of funds
- ☐ Attachment 7: Schedule of grant usage and matching grant details
- ☐ Attachment 8: Map of communities proposed to be served

Application Checklist for Partnership

- ☐ Application – Completed by lead organization only; other organization(s) must still complete Part I and II (page 1) of the application
- ☐ Attachment 1: List of board of directors, if available
- ☐ Attachment 2: Minimum 10 letters of support from municipalities
- ☐ Attachment 3: Joint narrative proposal on the initiatives **and** how the organizations will collaborate and carry them out; this should include the application's lead contact, who shall be responsible for grant money disbursement, reporting and communication to MOBD
- ☐ Attachment 4: Proposed performance measures for joint initiatives, programs, and market activity
- ☐ Attachment 5: Most recent audited or reviewed financial statements for each partner
- ☐ Attachment 6: Joint line item budget for proposed use of funds
- ☐ Attachment 7: Joint schedule of grant usage and matching grant details
- ☐ Attachment 8: Map of communities proposed to be served

Governance: REDO Services Required by Section 9 of Chapter 219 of the Acts of 2016

Contracts for services entered into under this section shall include, but not be limited to, the following required services to be performed by the regional economic development organizations on behalf of the commonwealth:

- (i) assessing regional competitive strengths, weaknesses and opportunities;
- (ii) representing the regional business community in long-range workforce skills pipeline planning efforts to ensure robust skills and talent pipelines that meet regional needs;
- (iii) representing the regional business community in collaborative, long-range workforce skills, transportation and land use planning;
- (iv) promoting regionally significant industry clusters;
- (v) promoting connections across sectors of the regional economy;
- (vi) maintaining an inventory of key development parcels;
- (vii) marketing the region in coordination with the Massachusetts Marketing Partnership established under section 13A; and
- (viii) furnishing advice and assistance to businesses and industrial prospects which may locate in the region.

REGIONAL ECONOMIC DEVELOPMENT ORGANIZATION APPLICATION - FY 2017

PART I. APPLICANT INFORMATION				
Organization Name:				
Is this applicant organization applying as part of a regional partnership?	Yes <input type="checkbox"/> No <input type="checkbox"/>			
If Yes, name of other organization(s) comprising the Partnership:				
Website(s):				
Lead Contact Info	Name/Title: Phone: Email:			
Organization Address				
Organization Details	Year established:		Number of full time employees:	

PART II. ORGANIZATION STRUCTURE & ELIGIBILITY		
Is the organization a public/private partnership?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is the organization a membership organization?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If Yes, number of members:		
Does the organization have a Board of Directors?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If Yes, please attach a list of board members		Attached <input type="checkbox"/>
An IRS designated 501(c) - organization?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Primarily focused on regional economic development?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Represent 10 or more contiguous cities or towns?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Actively engage in activities that promote job creation and retention across all industry sectors within the region identified in Part III?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have a comprehensive plan with formal programming that encourages participation in economic development activities by a wide variety of organizations, governments and businesses operating in the identified region?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Receiving or have commitments to receive substantial financial and in-kind support from private resources or member municipalities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Capable of and agrees to provide services to the entire region identified in the proposal?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have a demonstrated history of collaboration with the business community, local officials, higher education and other strategic partners within the identified region?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Establish, track and evaluate results-driven performance measures of programs, initiatives and regional market activity?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Perform the services required by MGL Chapter 23A Section 3J and 3K, as amended by Sections 8 and 9 of Chapter 219 of the Acts of 2016?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Serve as or constitute as any of the following:		
Regional Employment Board under G.L. c. 40B?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Tourism Council under G.L. c. 23A §14?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Entities, which are political subdivisions of a municipality or wholly owned by a municipality?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

PART III. IDENTIFICATION OF REGION & COVERAGE AREAS

Indicate the total number of the following:

Municipalities Represented:	
If applying as a part of regional partnership, total combined municipalities represented:	
43D Communities represented:	
Gateway Cities represented:	
Please list municipalities represented by the organizations (Please indicate 43D Communities with a pound (#) sign). Attachment 2: Please attach at least 10 letters of support from elected official from municipalities.	

PART IV. REDO GRANT PROPOSAL NARRATIVE, KEY COMPONENTS & PERFORMANCE MEASURES

Proposal Attachment 3 – Narrative on proposed initiatives	Attached <input type="checkbox"/>
<p>Applicants should address how the organization will align its initiatives to the key components described on the following pages. This is an opportunity for the REDO to self-identify initiatives and programming, define the most organizationally-relevant performance measures and ensure that the organization has the capacity to meet the minimum grant conditions and deliverables required by MOBD. The narrative should also include the value-added by the organization to the region and how it demonstrates the intended purposeful uses of grant funds. Limited to 4 pages.</p> <p>**Partnerships are allowed max 5 pages for a signed joint narrative, including how the organizations will collaborate on executing the initiatives.</p>	
Proposed performance measures for initiatives, programs, and market activity	Attached <input type="checkbox"/>
<p>Define performance measures and key deliverables for each of the Key Components (Attachment 4)</p>	

REGIONAL ECONOMIC DEVELOPMENT ORGANIZATION APPLICATION - FY 2017

PART V. ORGANIZATION OPERATING BUDGET, OTHER FUNDING & GRANT REQUEST		
Operating Budget (not including REDO funding):	Total estimated operating budget:	\$
	What is the percentage of budget above from the private sector?	%
	What is the percentage of budget above from public sector? (not including REDO grant funds)	%
	*Note: both percentages should add up to 100%	
Audited Financial Statements	Proposal Attachment 5 (provided by the applicant): Most recent audited or reviewed financial statements. Please submit a copy of the applicant's most recent audited or reviewed financial statements.	Attached <input type="checkbox"/>
Federal Grant Funds:	Did your organization or your affiliate organization receive any federal grants in FY2016?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	If yes, please list granting organization and amount:	
REDO Grant Funds:	Did your organization or affiliate organization receive a REDO grant in FY2016?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	If yes, please provide amount: \$	
Massachusetts State, Quasi and Local Grant Funds:	Did your organization or affiliate organization receive any other non-REDO state or quasi-public funding in FY2016?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	If yes, please list granting organization and amount:	
	Will your organization or affiliate organization receive, or apply for any federal, non-REDO state or quasi-public program funding for FY2017 ?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	If yes, please disclose in an attachment to the line item budget: 1) The origin and amount of the funding; 2) Define how the REDO Grant funds will be differentiated; and 3) If applicable, describe any initiatives that are planned to be jointly funded through the REDO Grant and another public funding source.	Attached <input type="checkbox"/>
FY2017 REDO Funding Request:	Amount: \$	
Line Item Budget	Proposal Attachment 6 (provided by the applicant): Line item budget for proposed use of funds. Please submit a line item budget for the proposed use of funds in a table format.	Attached <input type="checkbox"/>

REGIONAL ECONOMIC DEVELOPMENT ORGANIZATION APPLICATION - FY 2017

PART VI. CONFLICT OF INTEREST

Pursuant to Chapter 240 of the Acts of 2010, REDOs are subject to not only performance measurements (see <http://www.malegislature.gov/Laws/GeneralLaws/PartI/TitleII/Chapter6A/Section16G>) and uniform standards related to accounting procedures, personnel practices, and purchasing procedures, but they are also subject to conflict of interest rules (see <http://www.mass.gov/ethics/education-and-training-resources/implementation-procedures/state-employees-summary.html>). Accordingly, as a condition to receiving grant funds from MOBD, the REDO Grant contract shall require that in any matter in which a person, corporation or other business entity in which you or any member of your organization is in any way interested, such interest shall be disclosed in writing in advance and that you or any member of your organization having such an interest may not participate in a decision relating to such person, corporation or other business entity. As deemed necessary, the REDO Grant contract shall also require that the Grantee undergo a biennial audit and examination of the audited financial statements of the REDO conducted by the auditor of the Commonwealth.

I agree ☐

PART VII. SIGNATORY, CERTIFICATION & ACKNOWLEDGEMENT

I/We, (names and titles) of the (Regional Economic Development Organization) submitting a proposal for the FY2017 Regional Economic Development Organization Grant Program, as established by the Commonwealth of Massachusetts and administered by the Massachusetts Office of Business Development, hereby certify that I/we have been authorized to file this proposal and to provide the information within and accompanying this proposal. I/we certify that the information provided herein is true and complete and that it reflects the applicant's intentions to the best of my/our knowledge. I/We understand that the information provided within this proposal will be relied upon by the Commonwealth in deciding whether to contract with the organization and that the Commonwealth reserves the right to take action against the applicant organization or any other beneficiary if the Commonwealth discovers that the applicant intentionally provided misleading, inaccurate, or false information. I/We make this certification under the pains and penalties of perjury.

The signatories also hereby acknowledge that, under the Public Records law of the Commonwealth of Massachusetts, this application and all documents submitted in support thereof are public records under the provisions of Massachusetts G. L., Ch. 4, sec. 7 (26).

[Type name here]

☐ E-Signature of REDO Representative

☐ Date

[Type name here]

☐ E-Signature of REDO Representative

☐ Date

This Application is requested electronically. For reporting purposes, please type in your name and click the box acknowledging your E-Signature.

REGIONAL ECONOMIC DEVELOPMENT ORGANIZATION APPLICATION - FY 2017

Attachment 4: Proposed performance measures for initiatives, programs, and market activity

Please note that all rows in the table DO NOT need to be completed, but the **minimum deliverables of each key component must be met as outlined in the Key Components** (one sample listed below). Please elaborate or add your goals and deliverables.

Key Component	Measurable Goals / Initiatives	FY'17 Deliverable
Regional Initiatives and Programs & Strategic Partners		
Retain, Expand, and Attract Businesses		
Workforce Development	Representing the regional business community in long-range workforce skills pipeline planning efforts to ensure robust skills and talent pipelines that meet regional needs	Host 1 job fair or similar event to promote workforce development (please give the date)
Regional Collaboration		
Communication, Highlights, Issues & Reports		